Objectives:

- To learn how navigate the menu to find initial requirements and their respective statuses
- To learn how to complete and submit an initial requirement

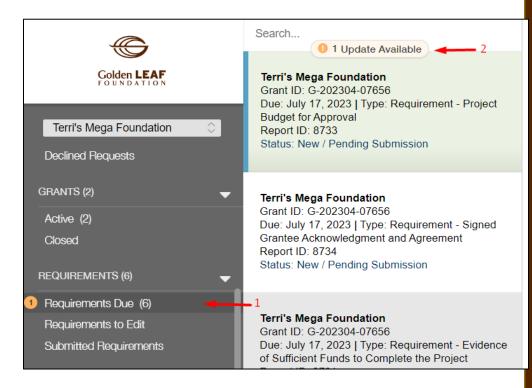
Locating requirements due

 When you log in to your grant portal account (see quick reference sheet, *How to Log In*, <u>here</u>), scroll down the menu to the **REQUIREMENTS** section. If there are orange indicators to the left, that means updates have been made. In the example below, one update has been made to **Requirements Due**.

©	Search 1 Update Available
Golden LEAF FOUNDATION	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Project Budget for Approval Report ID: 8733 Status: New / Pending Submission
Declined Requests	
GRANTS (2) Active (2) Closed REQUIREMENTS (6)	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Signed Grantee Acknowledgment and Agreement Report ID: 8734 Status: New / Pending Submission
 Requirements Due (6) Requirements to Edit Submitted Requirements REPORTS (8) Reports Due (3) 	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Evidence of Sufficient Funds to Complete the Project Report ID: 8731 Status: New / Pending Submission
Reports to Edit Submitted Reports (5) PAYMENTS (6)	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Grant Management Workshop Attendance Verification Report ID: 8732 Status: New / Pending Submission



2) Click Requirements Due then click the update bar indicating, in this example, 1 Update Available.



3) Requirements that are due listed to the right of the menu. Shown in this screen shot is a requirement for the lease agreement and a requirement to submit the project budget for approval, both due July 17, 2023.

Colden LEAF FOUNDATION Terri's Mega Foundation \diamondsuit Declined Requests	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Lease Agreement Report ID: 8736 Status: New / Pending Submission
GRANTS (2) Active (2) Closed REQUIREMENTS (7)	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Project Budget for Approval Report ID: 8733 Status: New / Pending Submission
Requirements Due (7) Requirements to Edit Submitted Requirements REPORTS (8)	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Signed Grantee Acknowledgment and Agreement Report ID: 8734 Status: New / Pending Submission



4) Click the desired requirements, and it will open (to the right) for viewing. As indicated by the arrows in the image below, note the blue and gold bars at the edge of each report. **Blue** indicates the report is being viewed. **Gold** means the item has been updated but not viewed.

You do not need to open the requirement to only upload documents. [Should you choose to open the requirement, click Edit, at the upper right corner, to open it.]

¢	Search	Edit
Golden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656	Tern's Mega Foundation
Terri's Mega Foundation	Due: July 17, 2023 Type: Requirement - Lease Agreement Report ID: 8736 Status: New / Pending Submission	Grant ID: G-202304-07656 Duic: July 17, 2023 Report Type: Requirement - Project Budget for Approval Report ID: 8733
REQUIREMENTS (7) 🗸 🗸	Terri's Mega Foundation Grant ID: G-202304-07656	Status New / Pending Submission
Requirements Due (7)	Due: July 17, 2023 Type: Requirement - Project	
Requirements to Edit	Budget for Approval Report ID: 8733	Table Of Contents
Submitted Requirements	Status: New / Pending Submission	✓ Table OF Contents
REPORTS (8) 🗸 🗸		Regultements Notes Documents

5) There are three primary sections to note when you're preparing to submit a requirement.

Requirements Notes: Additional information or explanatory notes will be found here. For example, for "Requirement - Other", you will find the details of what the special requirement or grant condition are.

Documents: Upload the document or documents solely related to the specific grant requirement. There is only <u>one</u> document upload opportunity per requirement, so, if there are multiple files to upload, be prepared to upload them at the same time. See <u>Uploading Documents for Requirements</u>.

Cancel/ Save/ Save and Close: This section applies if you have opened the requirement by using the "Edit" button. *You do not need to open the requirement to only upload documents.* Initial requirements are very straightforward, typically requiring only the submission of a single or several documents. Once those documents are uploaded, simply click Save and Close, to save and close.

Report Type: Requirement - Project Budget for Appr	oval	Due: July 17, Report ID: 87			
▼ Table Of Contents					
Requirements Notes Documents					
 Requirements Notes 					
▼ Documents					
Requirement - Project Budget for Approval					
Re	quireme	nt Attachme	nts		

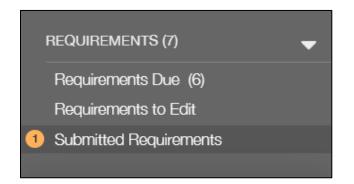


6) Uploaded documents now appear in the "Requirement Attachments" section. Click Submit at the bottom right corner of your screen, then click OK. Be sure to confirm submission by noting the change of status from "New/Pending Submission" to "Report Submitted".

Ģ	Search			Edit
Colden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Project	Status	New / Pending Submission	
Terri's Mega Foundation	Budget for Approval Report ID: 8733 Status: New / Pending Submission	▼ Table Of Contents		
Declined Requests	Terri's Mega Foundation	Requirements Notes Documents		
GRANTS (2)	Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Lease Agreement Report ID: 8736	Due Date:	7/17/2023	
REQUIREMENTS (7)	Status: New / Pending Submission	▼ Requirements Notes		
Requirements Due (7) Requirements to Edit Submitted Requirements	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Signed Grantee Acknowledgment and Agreement Report ID: 8734 Status: New / Pending Submission	▼ Documents		
REPORTS (8)	Status: New / Pending Submission		Requirement Attachments	
Reports Due (3) Reports to Edit Submitted Reports (5)	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Evidence of Sufficient Funds to Complete the Project Report ID: 8731	G-202304-07656_Terris, Requirement - Project Budget for Ap Added by Gran Tee at 12:02 PM on Jur		
FLUXX	Status: New / Pending Submission			Submit



7) You should receive an automated e-mail notifying you that your report has been submitted. You can also check the status of your report in the grant portal. You'll see an update dot beside **Submitted Requirements** in the menu.





8) Click Submitted Requirements, then click the update bar to refresh your list. You can then view your submitted requirements. Note that you no longer have an edit button at the upper right corner of your screen. That is because your report is now in "Report Submitted" status.

Colden LEAF FOUNDATION Terri's Mega Foundation REQUIREMENTS (7) Requirements Due (6) Requirements to Edit Submitted Requirements	Search 1 Upda	ate Available		
<i>C</i>	Search			¢
Colden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656	Terri's Mega Foundation		
Terri's Mega Foundation	Due: July 17, 2023 Type: Requirement - Project Budget for Approval Report ID: 8733 Status: Report Submitted	Grant ID: G-202304-07656 Report Type: Requirement - Project Budget	Due: July 17, 2 for Approval Report ID: 873:	
REQUIREMENTS (7) Requirements Due (6) Requirements to Edit) Results	Status	Report Submitted	
Submitted Requirements (1)		Table Of Contents		

9) When your program officer has determined that s/he has the basic information needed to begin review of your requirement, you'll receive an e-mail notification that the requirement has been received. The status bar will change to reflect that. You'll use the same process as in step 8 to see the updated status.

Control of the second secon	Search		
Golden LEAF FOUNDATION	Terri's Mega Foundation Grant ID: G-202302-06841	Terri's Mega Foundation	
Terri's Mega Foundation	Due: February 28, 2023 Type: Interim Report Report ID: 7547 Status: Received	Grant ID: G-202302-06841 Report Type: Interim Report	Due: February 28, 2023 Report ID: 7547
Uludeu	No Results	Status	Received
REPORTS (2) Reports Due (1) Reports to Edit		Due Date:	2/28/2023
Submitted Reports (1)			

10) Should your program officer require additional information or documents, you'll receive an e-mail notification. When you log in, the requirement will now be found in "Requirements to Edit". Repeat the process previously described to access the requirement, by clicking the update bar to view, and selecting the returned report. Because the ball is in your court, you have edit access to make the required updates. Click Edit to open the requirement. You'll see the note

5



from GLF, in a yellow field at the top, and a status change to "Returned to grantee". It will explain what is needed from you.

¢	Search	Edit 🖨
Golden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656	Terri's Mega Foundation
Terri's Mega Foundation	Due: July 17, 2023 Type: Requirement - Project Budget for Approval Report ID: 8733 Status: Returned to Grantee	Grant ID: G-202304-07656 Due: July 17, 2023 Report Type: Requirement - Project Budget for Approval Report ID: 8733
REQUIREMENTS (7)		Note from the Foundation: Please update the budget table to reflect the amount awarded by GLF and related adjustments. Thanks!
Submitted Requirements		Note To Foundation :
Reports Due (3) Reports to Edit		Status Returned to Grantee

11) Upload any required documents (See <u>Uploading Documents for Requirements</u>), make comments back to your program officer in the "Notes to Foundation" field if needed, then click <u>Save and Close</u>, <u>Resubmit</u>, and finally, <u>OK</u>.

Grant ID: G-202304-07656 Due: July 17, 2023 Report Type: Requirement - Project Budget for Approval Report ID: 8733									
								lote from the Foundation:	
	PI		-	e the b	udge	t table	e to ref	ct the amount awarded by GLF and related adjustments. T	Thanks!
Note To	Foun	datio							
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Note To <i>T</i> ਃ				S	S1	S1	:=	-	5 ट



Resubmit		Х
You are about to Resubmit this Requirements form. Please confirm that you wou proceed.	ıld like to	
	Cancel	ОК

12) In the "Submitted Requirements" section of the grant portal, you can follow the status of your requirement. When you're not logged in to the grant portal, you'll still receive e-mail notification of each requirement's status, until...

æ	Search		Ę
Golden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656	Terri's Mega Foundation	
Terri's Mega Foundation	Due: July 17, 2023 Type: Requirement - Project Budget for Approval Report ID: 8733 Status: Received	Grant ID: G-202304-07656 Due: July 17, 2023 Report Type: Requirement - Project Budget for Approval Report ID: 8733	
REQUIREMENTS (7) 🗸 🗸			
Requirements Due (6)		Status - Received	
Requirements to Edit			
Submitted Requirements (1)			
CONGRATULATIONS!	It's approved!		
	Search		₿
Golden LEAF	Terri's Mega Foundation Grant ID: G-202304-07656 Due: July 17, 2023 Type: Requirement - Project	Terri's Mega Foundation	
Terri's Mega Foundation	Budget for Approval Report ID: 8733 Status: Approved	Grant ID: G-202304-07656 Due: July 17, 2023 Report Type: Requirement - Project Budget for Approval Report ID: 8733	

Status

At this point, the approved report will remain in your "Submitted Requirements" folder, in view-only status. Note also that previously submitted documents can't be modified or removed. They can only be previewed.

Still have questions? Send your question(s) to <u>grantportalhelp@goldenleaf.org</u> or drop by virtual office hours (schedule posted <u>here</u>).

Requirements Due (6) Requirements to Edit Submitted Requirements (1)



Approved



Uploading Documents for Requirements

You may upload documents to the portal in two ways:

- Drag and drop, or
- Select a file.

NOTE: For requirements, multiple documents must be uploaded at one time. Click and hold the CTRL key to select multiple documents before dragging or clicking Open to upload.

1)	Click the the (+) icon to					
,	upload a document.	▼ Documents				
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		Reports to Edit	Terri's Mega Foun Grant ID: G-202304	ТСору		
		Submitted Reports (5)	Due: June 2, 2023 Requirements Com Add files Start up	oload		
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57	chek start aproad.					
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L					
			OR		
5)	Click the the 🕂 icon to				
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	key and click Open.	GRANTS (2) Active (2)	Grant ID: G-202304 Due: July 17, 2023 Management Work		Size Status
			Report ID: 8732 Status: New / Pend		
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			Requirements Com Report ID: 8720		
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Still have questions? Send your question(s) to grantportalhelp@goldenleaf.org.

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